Guided Practice 16

Retiree Insurance Reports

August 11, 2017

This guide will walk you through how to view and download retiree insurance reports.

This guided practice assumes you already know how to:

- Log in to MyTRS
- Enter retiree insurance deductions

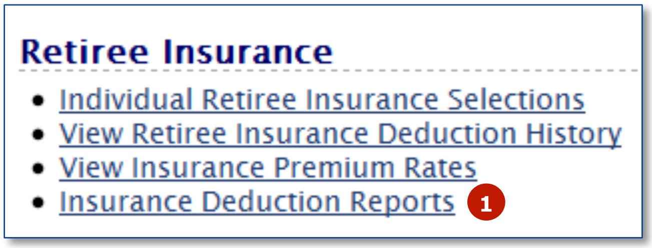
For additional information and troubleshooting please contact
your district's assigned ESU representative or EmpSup@trb.state.ma.us

MTRS
MASSACHUSETTS TEACHERS' RETIREMENT SYSTEM

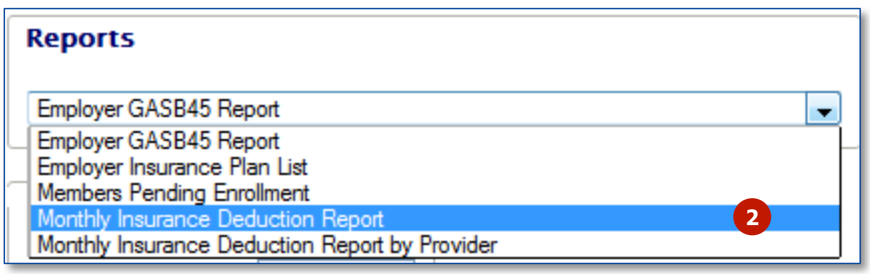
Viewing and Exporting Retiree Insurance Reports

MyTRS allows employers to view and download four distinct reports to manage their insurance process and meet their reporting needs.

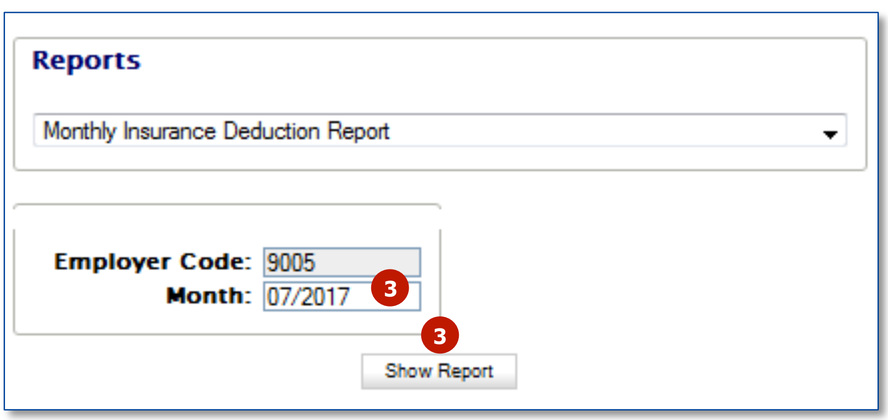
1. Select "Insurance Deduction Reports" from the home page or from the "Go To" drop down list at the top of the page.



2. From the "Reports" drop down list, choose the report you need. In this example, we chose the "Monthly Insurance Deduction Report" option.

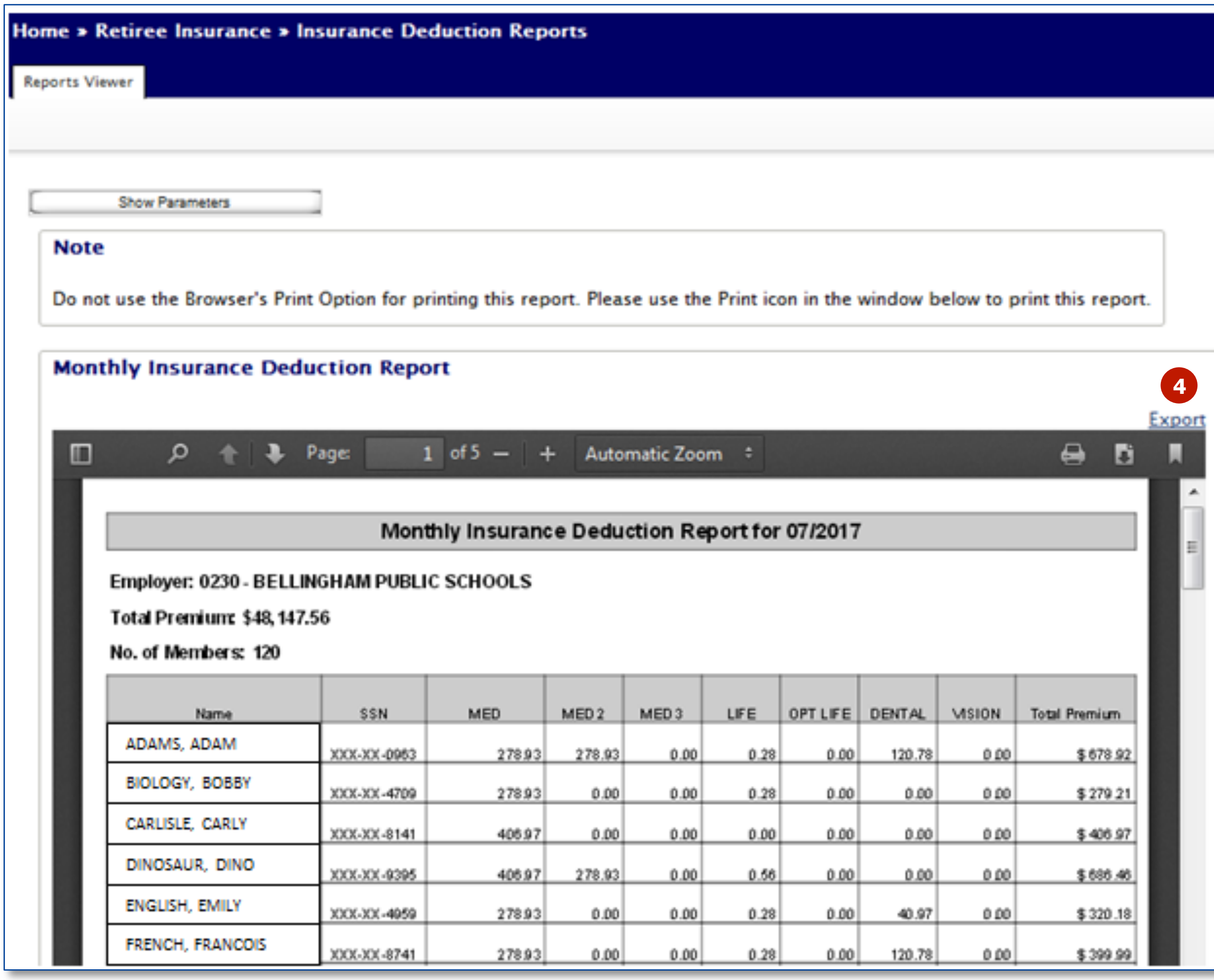


3. Enter the report month and year and click **Show Report.**

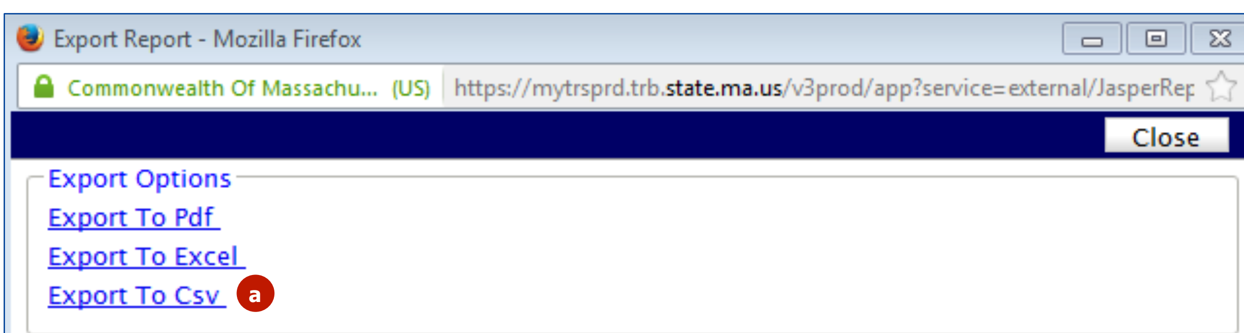


The report month defaults to the current month. You may need to change this date if this month's retirment warrant hasn't been processed, or if you want to access a report for a prior month.

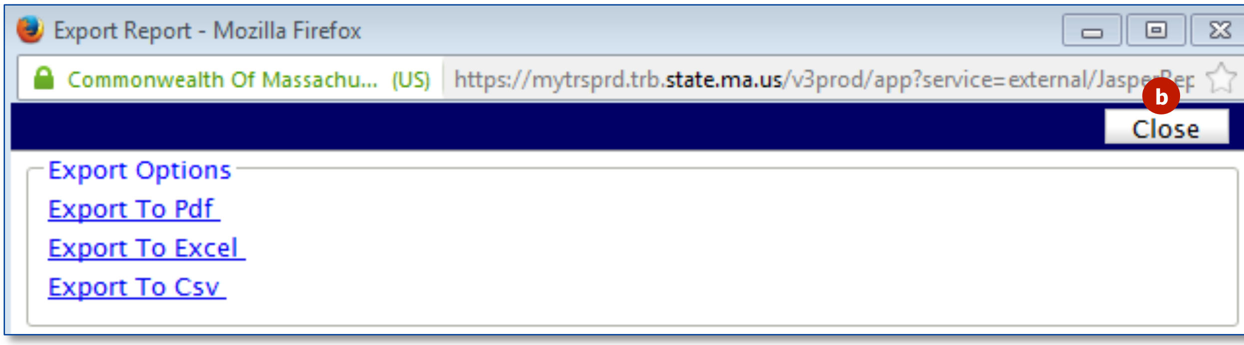
4. Once the report displays, click **Export** in the top right corner of the screen.



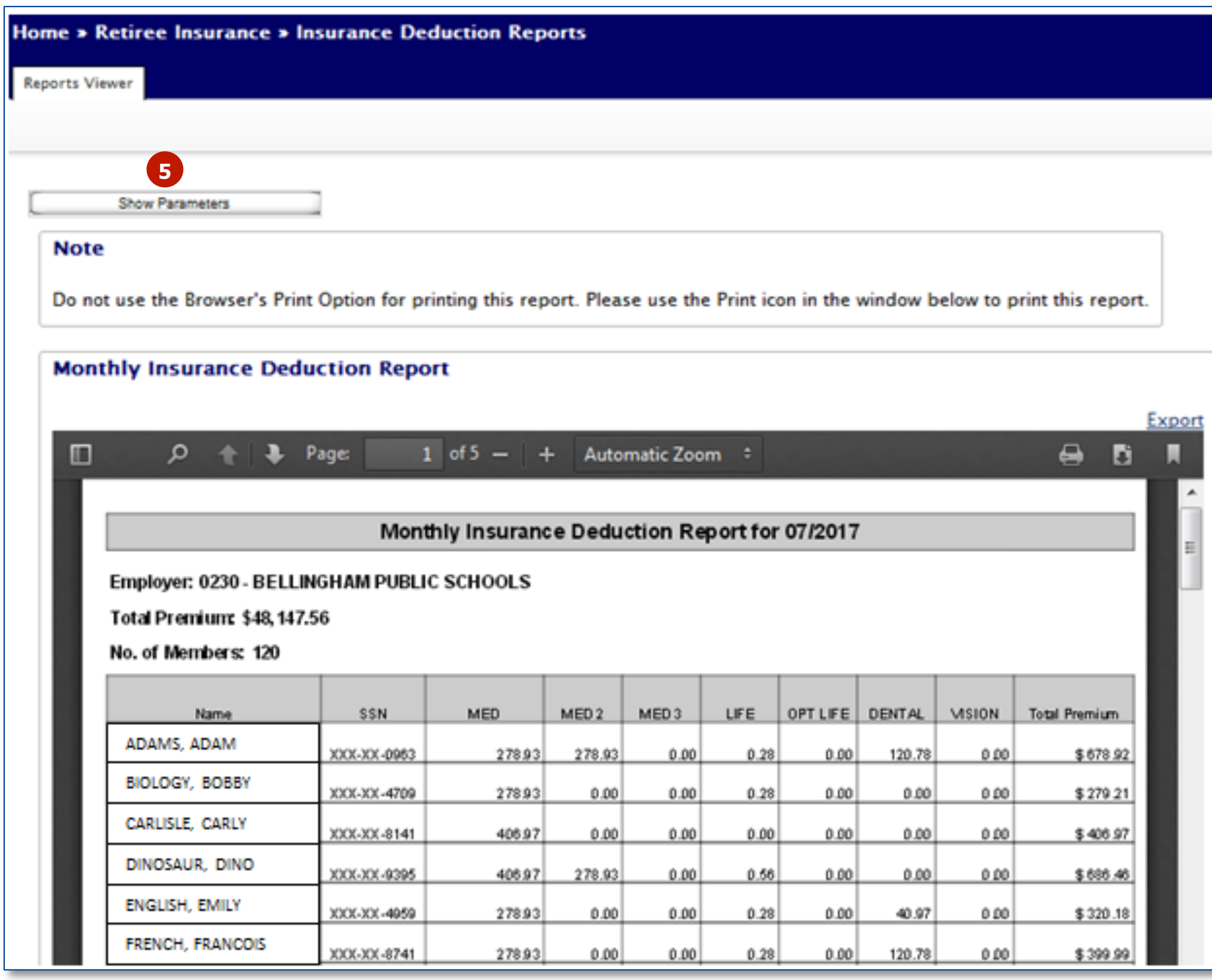
a. The report can be exported to PDF, Excel, or CSV. Choose the program of your choice and follow the prompts to complete the export process. The file can be saved with the chosen program. MTRS recommends exporting to a **CSV** file and opening the report in Excel.



b. Once the data has been exported click **Close** in the top right of the screen.



5. To go back to the main Insurance Deduction Reports page, click **Show Parameters**.



Monthly Insurance Deduction Report for 07/2017

Employer: 0230 - BELLINGHAM PUBLIC SCHOOLS

Total Premium: $48,147.56

No. of Members: 120

Name	SSN	MED	MED 2	MED 3	LIFE	OPT LIFE	DENTAL	VISION	Total Premium
ADAMS, ADAM	XXX-XX-0963	278.93	278.93	0.00	0.28	0.00	120.78	0.00	$ 678.92
BIOLOGY, BOBBY	XXX-XX-4709	278.93	0.00	0.00	0.28	0.00	0.00	0.00	$ 279.21
CARLISLE, CARLY	XXX-XX-8141	406.97	0.00	0.00	0.00	0.00	0.00	0.00	$ 406.97
DINOSAUR, DINO	XXX-XX-9395	406.97	278.93	0.00	0.56	0.00	0.00	0.00	$ 686.46
ENGLISH, EMILY	XXX-XX-4959	278.93	0.00	0.00	0.28	0.00	40.97	0.00	$ 320.18
FRENCH, FRANCOIS	XXX-XX-8741	278.93	0.00	0.00	0.28	0.00	120.78	0.00	$ 399.99

6. From the main page you can generate the same report for a different month or choose a different type of report.